

Short-term Development Training

Objective

Develop and provide support to (i) in-country, (ii) non-U.S. based third country, and (iii) U.S.-based short-term (defined as no more than three weeks in duration) training programs. The U.S. based training will NOT commence before August 28, 2007. The aim of the training program will to build analytical, regulatory and administrative capacity and skills in economic reform policy development and implementation. The target audiences for this program are: Indians nationals, including GOI Officials from the central and the state governments; around 115 people are expected to participate under this training program (around 75 under the in-country and non U.S.-based third country training and 40 under the U.S.-based training).

Specific Tasks

The Contractor will undertake the following tasks:

I. For (i) in-country, (ii) non-U.S. based third country, and (iii) U.S.-based short-term development training, identify and forward for USAID/India's approval, announcements of relevant short-term development training programs offered by reputed institutions

- For (i) in-country and (ii) non-U.S. based third country short-term development training, the announcements will include all relevant training programs beginning with one month from the start date of the Contract and end August 31, 2008. For U.S.-based short-term development training, the announcements will include all relevant training programs beginning with one month from **August 28, 2007** and end **August 31, 2008**. No training program shall commence after August 1, 2008.
- The announcements will include full description of the program title, date/duration, location, program curriculum, profile of candidates suited/recommended to participate in the program, date by which nominations are expected to be filed, any other information deemed relevant.
- Only programs from known, reputed institutions will be offered. In the past, for U.S.-based short-term development training, programs have been offered from institutions such as Andrew Young School of Government/University of Georgia, Institute of Public-Private Partnership/Washington D.C., Harvard University, Boston Institute of International Development, University of Illinois, HIID, Office of Tax Administration/U.S. Treasury, International Law Institute, Atlanta Management Institute, Federal Reserve Training Center/Washington D.C., and Franklin Pierce Law Center/Concord, New Hampshire. Under this TO the Contractor will expand the list of training institutes to include quality training providers in the U.S. for short-term policy-based training.

- The short-term training programs will include, among others: Disinvestment and public enterprise reform; agricultural sector reform; financial sector reform including pensions, banking; international arbitration and the role of regulators; fiscal policy management including treasury reform, tax administration, fiscal policy analysis, public budgeting; fiscal decentralization; infrastructure financing; small and medium enterprise development; information and communication technologies.
- The training programs identified will encourage, as appropriate, participation of women.

II. Establish and Implement Procedure for Placement of Indian Trainees

- Based on 1) USAID/India's approval of a given program and 2) USAID/India's nomination of participants for a given program, the Contractor will confirm reservation and placement of candidates at the earliest.
- The Contractor will communicate timely information to the USAID/India to facilitate placement and participation of the candidates.
- Based on the nominations forwarded by USAD/India, the Contractor will confirm the placement of the trainees. After the participants' arrival, the Contractor will make all necessary arrangements (see Section IV below).

III. Establish Evaluation Criteria and Mechanisms to allow for Review of Training Programs and the Participants

- The Contractor will develop formats for conducting post training evaluation of both the training program offered as well as the participant attending the program. The aims of the two evaluations are as follows: 1) to determine, based on the quality and usefulness of the training program, whether the program should be offered in the future and 2) to determine the suitability of the candidate for the program based on participants feedback and performance. The implementation of the evaluation formats is subject to USAID/India's approval.

IV. Make all necessary Arrangement of Trainees

1. Administrative Arrangement

- i. All travel and logistics support including appropriate housing and procurement of tickets for participants. When requested by the Mission, arrange for participant home stays near the training site as an alternative to institutional housing solutions. Inform the Mission and participant of travel arrangements and dates;

- ii. Travel reservations, procurement of tickets and
- iii. For non-U.S. based third country, and U.S.-based short-term development training Arrange for VISAs for all participants in coordination with CTO and HELP/USAID in accordance to the USAID/India Training Rules and Regulations.
- iv. For non-U.S. based third country, and U.S.-based short-term development training Enroll all participants in the required health and accidental insurance coverage (HAC) and adjust as needed for program changes;
- v. For non-U.S. based third country, and U.S.-based short-term development training Have participants met upon their arrival in respective countries where training is held;
- vi. Provide timely payment of all allowances and expenses according to ADS Chapter 253 requirements, ensuring that payments are made for legitimate program purposes; For non-U.S. based third country, and U.S.-based short-term development training generate statement of earnings for tax filing on behalf of participants.

2. Monitor and Report on Participant Progress:

- i. Maintain (and document) regular contact with participants to identify and resolve problems, if any. Procedures should be developed for short-term participants to track activities, attendance, performance, problems and successful completion of program.
- ii. Notify the Mission on completion of all training programs and for non-U.S. based third country, and U.S.-based short-term development training the date of the participant's return to India. Please note all participants must return before 8/27/2008.
- iii. For non-U.S. based third country, and U.S.-based short-term development training Inform participants of tax liability, if any, using Global/Human Capacity Development guidance and assure that participants complete and file forms to Internal Revenue Service (IRS) as required.
- iv. Arrange, secure approval for, and document extensions and transfers.

3. Provide cultural and logistics orientation to all participants. Minimum orientation includes:

- i. Review of the Training Agreement including training program, training objectives, relationship to USAID/India strategic objectives and responsibilities of various stakeholder;
- ii. Review program schedule, transportation and logistics;
- iii. For non-U.S. based third country, and U.S.-based short-term development training Review of all non-U.S. third country and U.S. immigration and naturalization services (U.S. INS) rules affecting participants, particularly the 2-year return residency requirement before eligibility for permanent residency in the U.S.

- iv. Detailed information about daily activities (housing, shopping, food preparation, check cashing, transportation, correspondence, and communication)
- v. Orientation to the city, and the training site (geography, attractions, etc.)
- vi. Collect evaluations based on a jointly developed format. Analyze data and forward it to USAID/India.

V. Establish and Implement Necessary Management System

1. Maintain complete records:

- i. Trainee bio data, record of medical certificate, visa status, waivers, travel arrangements, advances to participants, as well as attendance at on-arrival sessions, Training Agreements, etc.
 - ii. Negotiations with training providers and cost savings achieved;
 - iii. Financial data with standard Training Costs Analysis elements on each participant program and for overall program.
2. Maintain individual participant files using a consistent and standardized format and retain files at least twelve months after the last bill for each training program is paid (including federal and states taxes). Transfer files to USAID/India for retirement.
3. Maintain additional database related to participants that meets all USAID data requirements, including biographical data, program data, cost data, process data (visa, language, medical, financial, travel) and participant training months accrued each quarter. Data elements required by USAID must be transmitted electronically.
4. Provide all required performance and financial reports of the trainees to the Mission. Within 30 days of the completion of each training program, provide complete financial reports reflecting all costs incurred in relation to that training program by participant.
5. Maintain records about training providers used, including nature of training, cost reduction and cost sharing, frequency of training, contact person, etc. Transmit required data elements to the Mission training provider clearinghouse.

Deliverables

In addition to the "Specific Tasks" mentioned above, the contractor is expected to deliver the following:

1. Quarterly report on progress of the activities as per SOW. The format will be provided by USAID/India in consultation with the contractor. The report will be submitted to USAID/India every quarter.

The report shall also include a financial statement providing the necessary information on budgeted. The financial report will contain five (5) columns that will states the following information by each Contract budget line item:

- Col.1 : Total amount of funds allocated to each budget line item over the life of the Contract;
- Col. 2: Amount of accrued expenditure against each of the budget line items in that quarter;
- Col. 3: Amount of accumulated expenditure against each budget line item till date;
- Col. 4: Amount remaining under each of the budget line items till the end of the Contract period;
- Col. 5: Estimated expenditure against each of the budget line items for the following quarter.

2. Participant's evaluation report will also be provided within four weeks on completion of each program.

